# DEPARTMENT OF HEALTH SERVICES

14/744 P STREET CRAMENTO, CA 95814

July 15, 1985



To: All County Welfare Directors County Administrative Officers

Letter No. 85- 53

REESE V. KIZER (COMMUNITY PROPERTY DIVISION OF INCOME WHEN ONE SPOUSE IS IN LTC)

This is to provide you with instructions for immediate implementation of a stipulated agreement pending appeal of the subject litigation.

#### Background:

In 1983 legislation (AB 1667, copy attached) was enacted which required recognition of the community property division of income when one spouse is in LTC and the other spouse resides at home, if federally permissible. The law was not implemented because the Department of Health and Human Services (DHHS) had indicated that such a division conflicts with federal law.

Reese v. <u>Kizer</u> (Alameda Superior Court) was initiated because AB 1667 has not been implemented. On April 29, 1985 a preliminary injunction was issued ordering the Department to implement a portion of the law. The Department filed an appeal which automatically stayed the injunction. Pending the appeal decision, we have entered into a stipulated agreement with the Plaintiffs to determine the shares of cost in accordance with subdivision (a) of AB 1667, in those instances where the applicant, beneficiary or person acting on behalf of an applicant/beneficiary requests such an action.

#### Instructions

Advise your staff to take the following actions immediately upon request by an LTC applicant, beneficiary or person acting on behalf of an LTC applicant/beneficiary. A request shall be a written or verbal reference to any of the following:

- 1. Reese v. Kizer
- 2. AB 1667
- 3. Section 14005.16, Welfare and Institutions Code, or words to that effect.
- 4. Community property division of income, or words to that effect.

Counties are under no obligation to advise applicants or beneficiaries that these instructions may apply in their case. Eligibility staff should apply these instructions only upon request; in all other instances existing regulations should be applied. Eligibility staff should explain to the persons requesting consideration of the division of community income that such consideration may only be temporary pending resolution of the litigation.

## A. Affected Population

The only persons affected by the agreement are persons in long-term care who:

- 1. Have spouses residing at home; and
- Are in their own MFBUs in accordance with existing regulations (22, CAC, Section 50377).

# B. Determination of Community Property Ownership

All unearned income received by the LTC spouse and all income (earned and unearned) received by the at-home spouse should be presumed community property income unless this presumption is rebutted by one of the spouses.

- C. Determination of the Amount of Community Property Unearned Income of the LTC Spouse Protected for the Spouse Living at Home
  - Identify the community property unearned income received by the LTC spouse.
  - Identify the community property income (earned and unearned) of the at-home spouse.
  - Combine the amounts determined in steps 1 and 2 and divide this sum by 2.
  - 4. Compare the amount determined in step 3 to the amount of the total community property income received by the at-home spouse (step 2). If the at-home spouse's income (step 2) is equal to or greater than the amount determined in step 3, the at-home spouse's community property interest is adequately protected and no further action need be taken to implement AB 1667. However, if the income received by the at home spouse is less than the amount determined in step 3, the

All County Welfare Directors -3-County Administrative Officers

difference must be treated as income of the at-home spouse and is not to be considered when determining the long-term care spouse's share of cost.

A worksheet is attached for use in calculating the community property income protection. Also included are examples of share-of-cost calculations. Please note that the allocation provisions of Title 22, CAC, Section 50563 are applied after calculating the community property income protection.

If you have any questions please contact Ruthell Ussery of my staff at (916) 324-4970.

Sincerely,

Original signed by

Doris Z. Soderberg, Chief Medi-Cal Eligibility Branch

cc: Medi-Cal Consultants

Medi-Cal Program Consultants

Expiration Date: July 15, 1986

#### Assembly Bill No. 1667

#### CHAPTER 1031

An act to add Section 14005.16 to the Welfare and Institutions Code, relating to Medi-Cal.

[Approved by Covernor September 21, 1983, Filed with Secretary of State September 22, 1983.]

#### LEGISLATIVE COUNSEL'S DIGEST

AB 1667, Connelly. Medically needy persons.

Existing law provides that one of the services covered under the Medi-Cal program is care received in skilled nursing or intermediate care facilities.

Existing law provides for the medically needy category of eligibility under the Medi-Cal program, under which persons who would qualify for specified public assistance programs but for their income or resources are still eligible for Medi-Cal if they have insufficient income to pay for the cost of health care. Under this category, however, individuals may be required to pay a share of costs in order to fulfill eligibility requirements.

This bill would provide that the community property interest of a noninstitutionalized spouse in the unearned income of the other spouse shall not be considered as available income to the spouse living in a skilled nursing facility or intermediate care facility for purposes of determining Medi-Cal eligibility if the spouses are not in the same Medi-Cal budget unit.

The bill would further specify that the community property interest of the institutionalized spouse in the unearned income of the noninstitutionalized spouse would be deemed as available income to the institutionalized spouse.

The bill would further provide that any federal waivers necessary in order to implement provisions of this act shall be sought by the State Department of Health Services, but that failure to obtain any necessary waivers shall not affect implementation of any provisions for which waivers are not necessary or for which waivers are obtained.

The bill further provides that the provisions of the act shall be implemented pursuant to adoption of emergency regulations.

The people of the State of California do enact as follows:

SECTION 1. Section 14005.16 is added to the Welfare and Institutions Code, to read:

14005.16. (a) In determining the eligibility of a married individual, pursuant to Section 14005.4 or 14005.7, who resides in a skilled nursing facility or an intermediate care facility, and who is in

a Medi-Cal family budget unit separate from that of his or her spouse, the community property interest of the noninstitutionalized spouse in the unearned income of the married individual shall not be considered income available to that individual.

(b) In determining the eligibility of a married individual pursuant to Section 14005.4 or 14005.7 who resides in a skilled nursing facility or an intermediate care facility, and who is in a Medi-Cal family budget unit that does not include his or her spouse, the community property interest of the institutionalized individual in the unearned income of the noninstitutionalized spouse shall be considered income available to that individual.

SEC. 2. (a) Any provision of this act that is in conflict with any federal statute or regulation shall be inapplicable to the extent of such conflict, but the provision and the remainder of the provisions shall be imaffected to the extent no conflict exists.

(b) The State Department of Health Services shall, within 30 days of the operative date of this act, seek all federal waivers necessary to implement the provisions. The provisions for which appropriate federal waivers cannot be obtained shall not be implemented, but provisions for which waivers are either obtained or found to be unnecessary shall be unaffected by the inability to obtain federal

waivers for the other provisions.

(c) The State Director of Health Services shall, within 30 days of obtaining all necessary federal waivers, adopt regulations implementing the provisions as emergency regulations in accordance with the provisions of Chapter 3.5 (commencing with Section 11340) of Part I of Division 3 of Title 2 of the Government Code. For the purposes of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code, the adoption of the regulations shall be deemed to be an emergency and necessary for the immediate preservation of the public peace, health and safety, or general welfare. Notwithstanding the provisions of Chapter 3.5 (commencing with Section 11340) of Part I of Division 3 of Title 2 of the Government Code, emergency regulations adopted by the State Department of Health Services in order to implement the provisions shall not be subject to the review and approval of the Office of Administrative Law. These regulations shall become effective immediately upon filing with the Secretary of State.

(d) If any provision of this act or the application thereof to any person or circumstances is held invalid, such invalidity shall not affect other provisions or applications of the act that can be given effect without the invalid provision or application, and to this end the

provisions of this act are severable.

- 1. Community Property Unearned Income LTC Spouse
- 2. Community Property
  Income At Home Spouse
  \$ + \$
  earned unearned
- 3. Total (Add lines 1 &2)
- 4. Each Spouse's
   Community Interest
   (line 3 2)
- A. If line 2 is equal to or greater than line 4, the at-home spouse's community property interest is adequately protected.

B. If line 2 is less than line 4 the at-home spouse's community property interest is not adequately protected.

- - Al. Use the amount in line 2 plus any separate income of athome spouse when determining SOC of athome spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.
  - A2. Use the amount in line 1 plus any earnings and separate income of LTC spouse when determining LTC soc.
  - B1. Use the amount in line 4\* plus any separate income of at-home spouse when determining SOC of at-home spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.
  - B2. Use the amount in line 4 plus any earnings and separate income of LTC spouse when determining LTC SOC.

<sup>\*</sup> If the at-home spouse has earnings, the earned and unearned portions of line 4 must be identified to enable the proper income deductions to be applied. (See example 2).

### Example 1:

\$800	unearned	income	is	received	in	the	name	of	the	LTC
	spouse*									

\$-0- is received in the name of the at-home spouse who is not linked to a Medi-Cal program.

# 1. Community Property Unearned Income of LTC Spouse \$800

2. Community Property Income of at-home

Spouse \$\frac{-0-}{\text{Earned}} + \frac{\text{S}}{\text{Unearned}}\$\$\$\$\$\$\$ \$\$ \$-0-\$\$

4. Each spouse's interest \$400

<sup>\*</sup> entered LTC last month

8	<b>-</b> X0J	n P	15. 1				Cen	nty District	County Use
		•		☐ Change ☐ Retro	to - Er-		Ette	ctive Elicibility Date t	or this Budget
	Number		1	Change C hetror	ECTIVE ETIS	Correction	on Mo.		. Yr,
1		Ī	Fers.	•		Simbolate		(1) Social Securit (2) Hearth Insurance	
C! 7 Dipit	Serial No	. MF5L	J No.1	Name - First, Middle, L	.est	. Mc. Day	Yr.	or Railroad Retire	ment No.   Cover
-				IC Scous	£			(2)	
						İ	<del>-                                    </del>	(1)	
1		1			<del></del> -			(2)	· · · · · · · · · · · · · · · · · · ·
		1	1 1		<del></del>	1		(2)	
	· · · ·	<u> </u>			- · · · · · · · · · · · · · · · · · · ·			(2)	
	<del></del>	Ì						(1)	
1		1					·	(1)	!
		İ						(2)	
ome of MFBL	Jimembei	rs applyi	ing as aped	II. Income of MERU				(2)	• • • • • • •
id, or disabled ent (except P.	d plus inc	ome of s	sponse or	II. Income of MFBU (except PA or oth		ot listed in L	III. Sha	re of cost computation	
NEXEMPT U	NEARNE	DINCO	OME	A. NONEXEMPT UN	VEARNED	INCOME	1.Coun	table income from 1.	18 700
	≱. ABD-	MN	D. Spouse o			<u> </u>	_ {	table income from 11.	ーコンガン
Ci21 Security	!		resent.	2. Net Income from		<u> </u>	<u> </u>		<u>"                                     </u>
it income	1		i 1	Property				Countable eligibility is (add 1 and 2)	380
om Property	[			3. Other—itemize			DEDUCT	IONS ADDED BACK	FOR LTC SOC
ner— imize	1						4.A5D	income deductions	i +\$20
711.27.26.45		,		4.				income deduction	1
# 3 (40)	11 3							oeductions appled bas	
cuctions	<u> </u>			E ====			[ (ಕಚರೆ 4	(and 5)	*   <del>2</del> 0
			 	5. Total unearnes inco (add 3 through 4)	om€		!	countable income	(1 = 0
mainear minus 6)	à.	į	<b>b</b> .	6. Deductions			ļ ————	3 and 6)	1701
mbines unear of 7a and 7b)	neo inc.	140		7. Countable unearned	ins		I ————	TIONS AND DEDUC	
y income ded	uction	-\$2C	<u> </u>	(5 minus 6)			سامعتا ا	tion from LTC/5&C = (176W, Part III)	102
untable unear	nec	7.5	<b>1</b>	B. NONEXEMPT EAR	NED INCOM	ΛΕ 	: 5. Alloca 7 chitore	tion to excluded in (176W, Part I)	
ome (Eminus	( <b>9</b>		·	8. Net earned Income (NTC 175W, Part IV, I	Line 11)		10. Incom	t to determine PA	
NEXEMPT EA	AHNEDII	NCOME	4.5v	9. Subtotal countable income (add 7 and 8	,		Eligibi		
oes E≱rned come	ž	<del>}</del> [	b.	10. Child Support/	<del></del>		ļ		
Suctions				Alimony paid.  11. Total countable inco	me i	<del></del>		Bocations/deductions through 21)	100
mainger				(9 minus 10)				et nonexempt income	110
minus 12)	Z.		₽. 			,	{7 m)n		1291
mbined earned <u>c 13a and 13t</u>							24. Total n	et nonexempt income	
earned inc. o	4						rounde		1291
mainner				<del>-</del>   ·		•	15. Mainte		
minus 15) untable earne c	inc.	<del></del>	<u> </u>	_		;	2. MFBU Nc.	members not in LTC	
vice 15 by 2)								members in LTC	
al countrole i c 10 and 17)	nc.	_3	<u> </u>			_	• Person • Upker	nal needs op of home	
EMPT INCOM	1E	·		<del></del>	, -	,	Needs	of disabled dependen	ets
							c. Total m (15a = 1	aintenance need 1551	25
							16. Share o		
						į	()4 min	us 35)	1256
y Worker Sign	vature/Cc	m.c.utat;	on Date	Worker Number	County	Jse	17, Unders	eyment acjustment	
		•				İ	18. Adjuste	C Shère of Cost	
							(27 min	us 18)	1256

w Applicati	ion 🗆 A	ledeterminatio	on 🗆 Change 🗀 Retroactive Elig		rrection	Effective Eligibility Date for this	Budget
	Number		32 22 Honobetive Eng	Γ		Mo. Yr.	
id 7 Digit S	Serial No. M	Pers.	Name – First, Middle, Last		nhdete Day Yi	Sex (1) Social Security No. at (2) Health Insurance Claim or Railroad Retirement N	No. Oth
			reliaible at-hom	4		(1)	D. Cover
	<b>!</b>		5001150			(2)	<del>-  </del>
				<del> </del>	· · · · · · · · · · · · · · · · · · ·	(2)	
Ī						(2)	. : .
					·	(2)	• • •
				<u> </u>		(1)	
						(1)	
						(1)	
me of MFBU disabled plus ept PA or oth	s income d	oplying as aged, of spouse or p	blind, II. Income of MFBU members not parent (except PA or other PA)	listed in I.		III. Share of cost computation	
EXEMPT UN			A. NONEXEMPT UNEARNED IN	COME		1. Countable Income from 1 14	T @
	a. ABD-MI	b. Spouse Parent	or 1. OASDI		,	2. Countable Income from II 9	17
DI		_	2. Net Income from Property			Income allocated from LTC/B&C person to family members at	1200
ncome Property			3. Other—Itemize			<u>home (176W, Part III)</u>	
r—I temize			semmaning involve	400		4. Combined Countable Income  [add 1, 2, and 3)  [add 1, 2, and 3]	
			4.	<u> </u>	L	ALLOCATIONS AND DEDUCTIONS	
1 thru 4)			5. Total unsarned Income	7		5: Allocation to excluded children (176W, Part I)	
ined unearne	d income	<u> </u>	B. NONEXEMPT FARNED INCOM	400	2	6. Income to determine PA Eligibility	
va and 5b) ncome deduc	tion	<b>→\$20</b>	NONEXEMPT EARNED INCOM     Total Net Earned Income	1€ 		7. Health Insurance	
table unearne			(MC 176W, Part IV, Line 11.)	<u>-</u>	-  -	8.	<del></del>
NUS 7) EXEMPT EAF	DAIED INICO	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	C. TOTAL COUNTABLE INCOME				
Earned 6.		b.	7. Subtotal (add 5 and 6)		و	9.	
ined earned in			8. Child Support/Alimony Paid		10	). Total allocations/deductions	<u> </u>
a and 9b)			9. Total Countable Income (7 minus 8)	400		(add 5 through 9)  1. Total net nonexempt Income	
rned inc. dec		***	NOTE:			(4 minus 10)	
nder (10 min	us 11)	- <del> </del>	If there is income from which Educa Expenses are deducted (Section	tional 505471		2. Total net nonexempt Income rounded	
eble earned Ir	ncome		calculations here. Enter net amount	on line 3 o	r4. 13	. Maintenance need	
12 by 2) countable Inc	ome	<u> </u>	Total income for educational purpo	se	a	MFBU members not in LTC No.	
and 13)			Less total educational expenses  Net countable income		<u>—</u> [ъ	. MFBU members in LTC	
he following	deductions :	apply, complete				<ul> <li>Personal needs</li> <li>Upkeep of home</li> </ul>	
Part VI befo	ore completion	ng Column 1:				Needs of disabled dependents     Total maintenance need	
ional Expense Parent Suppo	es ort	Section 50547 Section 50541				(13a + 13b)	· .
t Deduction is 1/3		Section 50551 Section 50551			14.	Share of cost (12 minus 13c)	
xpenses for t		Section 50551 Section 50551	.4		15.	Underpayment adjustment	
<b>_</b>	•	J. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.			16.	Adjusted Share of Cost	<del></del> .
ot Income						(14 minus 15)	

JOA HON/SPECIAL DEDU	CTION WORKSH	EET	County Use	Date This Form Effective
lame				Still Effective
- Z-Xoun			Case Number	Number in MFBU
OM THE MEBU NO.	NCOME OR PROPE	RTY EXCLUDED		
faintenance need for MFBU plus	excluded child(ren)	s		<i>;</i>
laintenance need for MFBU		s		
xcluded child(ren)'s share of me ine 1 minus line 2)	intenance need	s		
let nonexempt income of exclud	ed child(ren)	\$		
.llocation to excluded child(ren) ine 3 minus line 4)		s		
nter above amount on MC 176 M	1, column III, line 5			
			;	
			III. ALLOCATION FROM LTC OR E SPOUSE AND/OR CHILDREN A	SOARD AND CARE PERSON TO
31/SSP OR IESS RECIPIENT(S)	IN FAMILY-INCOM	ME AVAILABLE/	Maintenance need for spouse and, (other than excluded children)	for children at home s 509
/SSP appropriate payment level itus IHSS authorization for IHSS ily) atual SSI/SSP payment	\$		2. Total countable income of spouse and/or nonexcluded children     3. Total allocations/deductions of spouse and/or nonexcluded	s 400
r IHSS payment) et nonexempt income used to termine grant (or IHSS)	<b>s</b>  /////////	//////////////////////////////////////	A. Total net nonexempt income of se nonexcluded children (line 2 minutes).	Souse and/or us line 31
ne 1 minus line 2)  Toss unearned income of SSI/SSP  THSS recipient (other than ant or IHSS payment)	s	s ////////////////////////////////////	Unmet needs of spouse and/or nor (line 1 minus line 5)     Total countable income of	
I/SSP unearned income ductions and exemptions	s		person in LTC or board and care 7. Health insurance for person in	<u>\$400</u>
t nonexempt unearned income ne 4 minus line 5)	s		B. Total net nonexempt income of pe	erson in LTC or
oss earned income of SSI/SSP IHSS recipient	s		board and care (line 6 minus line 7	s 400
I/SSP earned income deductions dexemptions	s		10. Maintenance need for person in	
t nonexempt earned income ne 7 minus line 8)	\$		LTC or board and care  11. Total amount needed for maintena	s 35 ////////
tal net nonexempt income d lines 5 and 9)		\$	(add lines 9 and 10)  12. Amount available for allocation to	† 3 <b>5</b>
ine 10 is greater than line 3, the come available to the MFBU and it on MC 176 M, column I or II, lispient income available."	s entered here		children (line 8 minus line 11)  13. Allocation to spouse and/or childre (line 5 or line 12, whichever is less)	s 2.65
ne 10 is less than line 3, the difference to the SSI/SSP or IHSS rentered here and on MC 176 M, contered here and on MC 176 M, contents the second seco	cipient and	\$ \$	A For share of cost determination of ABD person, enter above amount of For share of cost determination of enter above amount on MC 176 M,	SDOUGE and/or children at home
y Worker Signature			Worker Number	Date of Computation
N (8/82)				

<u> </u>	211 CC				County District Coun	ty Use
		-	☐ Change ☐ Setroactive Elig		Effective Engiolity Date for th	in Economic
	e Number	-	To be the Control of the end	Correcti	Mo	is is bugget
Fi 7 Digis	Same bia	Eers.	Name : Eim Milli	Simboste	Sex (1) Social Security No.	
1	Serial No. M	FEU NO.F	Name - First Middle, Last	Mc. Day	Yr. (2) Hearth Insurance Cla or Railroad Retirement	im No.   Co No.   Cov
<u> </u>			LTC Spause		(2)	
					(1)	
					(2)	
					(2)	• • •
<u> </u>	<u> </u>				(2)	
1		!			(2)	
1					(1)	<u> </u>
}	1			<del>-</del>	(2)	
me of MFB	U members ap	piying as apad,	II. Income of MFBU members n		1 (2)	
l, or disable	d plus income 'A or other PA	no seudos fo	(except PA or other PA)	of listed in ].	III. Share of cost computation	
	JNEARNED II					
	I & AED-MN		A. NONEXEMPT UNEARNED	INCOME /	1. Countable income from 1. 15	52.7
	t. ACD-WK	D. Shouse or Parent	1. Social Security		2. Countable income from 11, 11	530
ist Security			2 Net income from		3. Total countable eligibility	
Income n Property	!	:	Probemy 3. Other-itemize		income ladd 1 and 21	530
er—	<u>!</u> !	:	<b>-</b> ∤		DEDUCTIONS ADDED BACK FOR	LTC SOC
112e					4. ABD income ceductions   ±520   16.0, any income deputation).	
Show	550		4.		5. Other income deductions	
≥) 5 i thru 4)	<del></del>	i			6. Total peductions added back	
uctions	·		5. Total unearned income		ledd 4 and 5)	20
i z i noer	i a	· D.	(acc ) through 4)  6. Decurrions		7. Total countable income (and 3 and 6)	550
inus 6)			1	<u> </u>	ALLOCATIONS AND DEDUCTION	
Dines unea 7a and 75)	rnecinc.	55 <i>0</i>	7. Countable unearned inc. (5 minus 6)		8 Allocation from LTC/S&C	
income ceu	Suction -s.	20	B. NONEXEMPT EARNED INCOM	AF	Income (176W, Part 11)	<u> 34                                    </u>
table unear		(20)	E. Net semes income		S. Allocation to excluded children (176W, Part 1)	
ME (8 minu EXEMPT E	ARNED INCO	ME	(MIC 176W, Part IV, Line 11)		10. Income to petermine PA Eligibility	
<u> </u>	<del></del>		income (acd 7 and 8)		11. Health Insurance	
S Ezined	2. 	<b>3</b> -10.	10. Child Support/ Alimony paid.		12. Total allocations/deductions	
octions		i i	11. Total countable income (9 minus 10)		(200 E through 11)	134
zinger	٤.	<b>b.</b>	(2.5)		13. Total net nonexempt income	7-7
ninus 12)   f Dined earne	e inc.	İ	<u> </u>	<u>.</u>	(7 minus 12)	910
13a and 13	(פ		· <u>]</u>		24. Total net nonexempt income rounded	
≘ērπec lnc. i \$un			₫.	-	25. Maintenance need	<u> </u>
einber alnus 15)					z. MFBU members not in LTC	
table earner	inc.		- 	-	No.	
countable	inc,	E C A	1		b. MFBU members in LTC  * Personal needs	•
		530_	<b>.</b>		Upkeep of home     Needs of disabled dependents	
·						
·	1E				t. Pizi maintenance need	
30 and 17) MPT INCON	1 E				c. Total maintenance need (25a + 15b)	35
·	1E		·			35

State Nu d 7 Digit Seri	ımber 	Bass	Name - First, Middle, Last  14-Lace Spance  Crecio Lee	lig. Correct Birthd. Mo. Day	Yr. Sex (1) Social Security No. and (2) Health Insurance Claim or Railroad Retirement No. (1)	d Na C
me of MFBU me	ial No. MF	Pers. BU No.	Name - First, Middle, Last  14-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1		Yr. (2) Health Insurance Claim or Railroad Retirement No. (1)	No. Oth
ime of MFBU me disabled plus in ept PA or other F			enclique		(1)	- FUDUEL
			indigible	1	(2)	
			U L		(1)	<del></del>
					(2)	
					(2)	
		1			(1)	
					(1)	
					(1)	
					(2)	
	ambers app	lving as aged h	lind II. Income of MFBU members n		(2)	
		spouse or pa	rent (except PA or other PA)	ot listed in 1.	III. Share of cost computation	
EXEMPT UNEA	ARNED IN	COME	A. NONEXEMPT UNEARNED	INCOME	1. Countable Income from 1 14	
à. A	ABD-MN	b. Spouse o	1. OASDI	- 1		
Di			2. Net Income from Property		3. Income allocated from LTC (28.0	475
ncome			·		person to family members at home (176W, Part III)	
Property   r-Itemize			3. Other—Itemize		4. Combined Countable Income	
	-		1000 ministration	150	(add 1, 2, and 3)	
			4.		ALLOCATIONS AND DEDUCTIONS	_
1 thru 4)			5. Total unearned Income		5: Allocation to excluded children (176W, Part I)	
ined unearned in	ncome	_!	(add 1 thru 4)		6. Income to determine PA Eligibility	
pa and 5b)		-\$20	B. NONEXEMPT EARNED INC	DME	7. Health Insurance	
ncome deduction	<u>'</u>	-320	6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	3-27		
able unearned in nus 7}	ncome		C. TOTAL COUNTABLE INCOM	TE	B.	
XEMPT EARNE	ED INCOM	E	7. Subtotal (add 5 and 6)	*		
Earned a.		b.			9.	
ined earned Inco	нпе		8. Child Support/Alimony Paid		10. Total allocations/deductions	
a and 9b)			9. Total Countable Income (7 minus 8)	477	(add 5 through 9) 11. Total net nonexempt Income	
rned Inc. deduct		• ** in	NOTE:		12. Total net nonexempt Income	
nder (10 minus 1	11) .		If there is income from which Edu Expenses are deducted (Section	n 505471 Aba		
able earned Incor	me		calculations here. Enter net amoun	t on line 3 or 4.	13. Maintenance need	
12 by 2) countable Income		- <u></u>	Total income for educational pur	pose	a. MFBU members not in	
and 13)			Less total educational expenses		b. MFBU members in LTC	
		3	Net countable income		Personal needs	
he following ded Part VI-before o	fuctions ap	ply, complete Column I:	/1500ros	5	Upkeep of home     Needs of disabled dependents	
ional Expenses		Section 50547	4509ros -75 325 nd		C. Total maintenance need	
Parent Support	5	Section 50541	75	1.70	(13a + 13b) 14. Share of cost	
s 1/3	Ş	Section 50551 Section 50551.1	7-1-11	*	(12 minus 13c)	
xpenses for the I for Self-Support	Blind S	ection 50551.4 lection 50551.5	) JAS NA		15. Underpayment adjustment	***************************************
					16. Adjusted Share of Cost	
ot Income				<u> </u>	(14 minus 15)	

Worker Signature

Worker Number

Computation Date

County Use

# Example 2:

\$700	Unearned	income	received	in	the	name	of	the	LTC
	spouse*								

\$400 Earned income received by at home spouse who is not linked to a Medi-Cal program.

- 1. Community Property Unearned Income \$700 of LTC Spouse
- 2. Community Property Income of at \$400 home Spouse \$\frac{400}{Earned} + \frac{5}{Unearned}\$
- 3. Total \$1100
- 4. Each Spouse's Interest \$550\*\*

<sup>\*</sup> entered LTC last month

<sup>\*\*</sup> at-home spouse's interest consists of \$400 earned and \$150 unearned

JUA HON/SPECIAL DEDUI	CTION WORKSHE	EET	County Use	Date This Form Effective
ame	·			The City
5-x2000	a. 2.		Case Number	Number in MFBU
HILDREN WITH SEPARATE II OM THE MFBU NO.		RTY EXCLUDED		
laintenance need for MFBU plus	excluded child(ren)	\$		\$ 
laintenance need for MFBU		s		
xcluded child(ren)'s share of me ine 1 minus line 2)	ntenance need	s		
et nonexempt income of exclude	ed child(ren)	s		
llocation to excluded child(ren) ine 3 minus line 4)		s		
nter above amount on MC 176 M	, column III, line 5			
			·.	
			III. ALLOCATION FROM LTC OR E SPOUSE AND/OR CHILDREN A	30ARD AND CARE PERSON TO
SI/SSP OR IHSS RECIPIENT(S)	IN FAMILY-INCON	1E AVAILABLE/	Maintenance need for spouse and (other than excluded children)	or children at home s 509
/SSP appropriate payment level rus IHSS authorization for IHSS rly)			Total countable income of spouse and/or nonexcluded children	s 475
rtual SSI/SSP payment r IHSS payment)	s		Total allocations/deductions of spouse and/or nonexcluded children	s ///////
et nonexempt income used to termine grant (or IHSS) ne 1 minus line 2)			Total net nonexempt income of sp nonexcluded children (line 2 minu	is line 3) s - 1/5
oss unearned income of SSI/SSP IHSS recipient (other than	<u> </u>		5. Unmet needs of spouse and/or not (line 1 minus line 5)	nexcluded children s 34
ant or IHSS payment) I/SSP unearned income	\$		Total countable income of person in LTC or board and care  7. Health insurance for person in	s 550
ductions and exemptions  t nonexempt unearned income he 4 minus line 5)	\$		LTC or board and care  8. Total net nonexempt income of pe	s ////////
oss earned income of SSI/SSP	\$		board and care (line 6 minus line 7	s 550
IHSS recipient  I/SSP earned income deductions	S			S ///////
t nonexempt earned income	\$		10. Maintenance need for person in LTC or board and care	s 25 ////////
tal net nonexempt income	\$ /////////		11. Total amount needed for maintena (add lines 9 and 10)	\$ 35
ine 10 is greater than line 3, the c		\$	12. Amount available for allocation to children (line 8 minus line 11)	\$ 5/5
ome available to the MFBU and in the MC 176 M, column I or II, li injent income available"	ne 3, as "PA	\$	13. Allocation to spouse and/or childre (line 5 or line 12, whichever is less)	) s
e 10 is less than line 3, the diffication to the SSI/SSP or IHSS rentered here and on MC 176 M. co	cipient and	S	A For share of cost determination of ABD person, enter above amount of For share of cost determination of enter above amount on MC 176 M.	spouse and/or children at home,
y Worker Signature		j 1	Worker Number	Date of Computation
W (8/82)				

		<u>xa</u> tv	· [2] E.				Conet	y District	County Use
w Applicat			ermination				Effect	ive Enginility Date	for this E
	Number			☐ Change ☐ Retro	Pactive Elig	. □ Correct	ion Mo.		Yr.
		<del></del>	Fers.			Bimbdat	1	(7) Social Securi	D: No
C: / Digit	Serial No.	. IMFBU	No.	Name - First, Middle, I		Mc. Day	Yr.	(2) Health Insuran or Railroad Resis	ement No.
		<u> </u>		LTC Spou	SE			1) 2)	
							1 13	1)	
								2)	<u> </u>
i i		<u>'</u>			·		i:	2)	••••••
	<del></del>	1					_	2)	
				_			1		
				-	<del></del>	i	- (:	<del></del>	
						1	!   t:		• • • • • •
ome of MFBL	J member		nr as - ned					)	• • • • • • • •
id, or oisabled ant (except P.	d plus inca	ome of si	DOUSE OF	II. Income of MFBL (except PA or ot	) members n her PA)	ot listed in 1.	III. Share	of cost computati	on
NEXEMPT U	NEARNE	D INCO	ME	A. NONEXEMPT U	NEARNED	NCOME :	1. Countal	ole income from 1.	16
	2. AED-	MN	D. Spouse or	1. Social Security		,	<u> </u>		14/~
cial Security	115		Parent	2. Net income from			<u> </u>	ole income from 1	"
: Income	477	50		Property			3. Total co	ountable eligibility (add 1 and 2)	111
m Property				3. Other-itemize				"	
hez— ·mlze								NS ADDED BACH	FOR LTC SOC
				1 4.			le.g., any	rincome debuction	1).
2!			~ <del>~~</del> .	_			<u>L</u> .	come deductions	
al thru4)	· · · · · · · · · · · · · · · · · · ·				ļ		6. Total de	ductions socied be	sk
CUETIONS		ì		5. Total unearned inco (acc 3 through 4)	ome			untable income	
maineer	ē.	i	Ď,	6. Deductions	<del>-</del>		ladd 3 a	nd 61	45
minus 6) mbinec unear	nec inc.	-z		7. Countable unearner	inc		ALLOCATI	ONS AND DEDU	CTIONS
d 72 and 75) y income oed		/	City	(5 minus 6)			8. Allocatio	n from LTC/B&C 176W, Part HI)	
	-	-\$20		B. NONEXEMPT EAR	NED INCOM	îΕ	5. Aliocatio	n to excluded	
untable unear ome (8 minus		Lef	60	E. Net earned Income (MC 175W, Family)	Lincata		Children	176W, Part I) C Cetermine PA	<u> </u>
NEXEMPT EA		COME		9. Subtotal countable	i	<del></del>	- Eligibility	,	<u> </u>
es Earned	ε. /	<b>3</b> - 1	<u> </u>	income (add 7 and 8	)		11. Hezith in  -	surance	
ome		<b>⊃</b> _↓		Alimony paid.			22. Total allo	cations/deduction	s
ouctions				11. Total countable inco	THE .		(and 8 th		
mainoer minus 12)	٤.		b.		<del></del>		23. Total net	nonexempt incom	1/17
nbined earned	1	<del></del>	·	<del>-</del>			·	nonexempt incom	<u>,                                    </u>
<u>c 13a and 19t</u> . earned inc. c	·/		1110				rounded	exempt incom	-
s \$unt				<u>.</u>			. 15. Maintena	oct need	
minus 15)							≥. MFBU me	mpers not in LTC	<u> </u>
intable earned rice 36 by 2)	inc.	pm 1 − ′′	J 009.2.				Nc.		
al countable i	nc.	47	1 <sub>3</sub> (3)	7			• Personal		
= 10 ≥n¢ 17) EMPT INCOM			U / U	J	, .	~.	• Upkeed • Needs o	of home Casebled depende	nts
LTELLINGUM	. <u>C</u>							tenance need	,
							(15a ÷ 15)		
						-	26. Share of c		all
y Worker Sign	ature/For	mauterra	on Cate	: Worker Number	1.5		<u> </u>	nent adjustment	
				** O' * ET IN U M DEI	County U	:5e	ļ .		
							128. Adjusted \$		

:w Applic	ation 🔲 I	Redetermination	n □ Change □ Retroactive E	:- Flo	Effective Eligibility Date f	Or this Ruges
Sta	te Number		= Hettoactive El	<del></del>		Yr.
Vid 7 Digi	t Serial No.	MFBU No.	Name – First, Middle, Last	Sirthda Mo. Day	12) Pro-les Security	No. and e Claim No. Othe
			rd ot-tone		(1)	ment No. Cover
-			Sioner		(1)	
					(2)	
			-		(2)	
					(2)	• • • • • •
					(1)	
					(1)	
					(1)	
disabled pl		pplying as aged, bl of spouse or pa	ind II. Income of MFBU members notent (except PA or other PA)	ot listed in I.	III. Share of cost computation	
VEXEMPT L	JNEARNED	INCOME	A. NONEXEMPT UNEARNED	NCOME		
	a. ABD-M	- T		NCOME	Countable Income from   1-	J32) /
DI		Parent		<u> </u>	2. Countable Income from 11 g	
Income	52	7	2. Net Income from Property		Income allocated from LTC/     person to family members at	D 9.0
Property r-Itemize			3. Other-Itemize		4. Combined Countable Income	
: I fetuize					(add 1, 2, and 3)	
			4.		ALLOCATIONS AND DEDUCT	TONS
) 1 thru 4)			5. Total unearned income		5: Allocation to excluded children (176W, Part I)	
ined unearr	ned income	527	B. NONEXEMPT EARNED INCO		6. Income to determine PA Eligibility	
Income dedu	ıction	-\$20	6. Total Net Earned Income	OME	7. Health Insurance	<del>                                     </del>
itable unearn			(MC 176W, Part IV, Line 11.)		8.	]
inus 71			C. TOTAL COUNTABLE INCOM	E	0.	
	RNED INCO	OME	7. Subtotal (add 5 and 6)		9.	,
Earned	<b>a.</b>	b.	8. Child Support/Alimony Paid	<del></del>	10. Total allocations/deductions	
oined earned 9a and 9b)	Income		9. Total Countable Income		1 (edd 5 through 9)	
arned Inc. de	eduction ed S20	**	(7 minus 8)		11. Total net nonexempt Income (4 minus 10)	504
einder (10 mi			If there is income from which Educ	cational	12. Total net nonexempt Income rounded	
table earned			Expenses are deducted (Section calculations here, Enter net amoun	n 50547), show tonline3 or4.	13. Maintenance need	
le 12 by 2) countable In			Total income for educational purp	oose	a. MFBU members not in	
B and 13)	icome		Less total educational expenses		b. MFBU members in LTC	
the followin	a daduations	apply, complete	Net countable income	<del></del>	Personal needs     Upkeep of home	
V, Part VI be	fore completi	ng Column I:			Needs of disabled dependent     Total maintenance need	15
itional Exper it Parent Sup	port	Section 50547 Section 50541			(13a + <u>1</u> 3b)	5.
nt Deduction lus 1/3		Section 50551 Section 50551.1			14. Share of cost (12 minus 13c)	
Expenses for e for Self-Su		Section 50551,4 Section 50551,5			15. Underpayment adjustment	
<u>.</u>	· · · · · · · · · · · · · · · · · · ·				16. Adjusted Share of Cost (14 minus 15)	
ipt Income					-	
				-		
			•			

	· · · · · · · · · · · · · · · · · · ·	rr.	County Use	Date This Form Effective
ame			Case Number	
HII DREN WITH SERVE	11/2 3			Number in MFBU
HILDREN WITH SEPARATE OM THE MFBU NO.	INCOME OR PROPE	RTY EXCLUDED		
aintenance need for MFBU plu	s excluded child(ren)	s		#
aintenance need for MFBU		\$		
keluded child(ren)'s share of ma me 1 minus line 2)	aintenance need	s	-	
et nonexempt income of exclud	•	s	-	
liocation to excluded child(ren) ne 3 minus line 4)		\$	-	
iter above amount on MC 176 A	A, column III, line 5		-	
-				
			*,	
٠.				
			III. ALLOCATION FROM LTC OR B SPOUSE AND/OR CHILDREN A	BOARD AND CARE PERSON TO THOME
I/SSP OR IHSS RECIPIENT(S)	IN FAMILY-INCON	E AVAILABLE/	Maintenance need for spouse and/ (other than excluded children)	
'SSP appropriate payment level us IHSS authorization for IHSS (y)			Total countable income of spouse and/or nonexcluded children	s 50 - ///////
tual SSI/SSP payment IHSS payment)	s		Total allocations/deductions of spouse and/or nonexcluded children	s ///////
nonexempt income used to ermine grant (or IHSS) e 1 minus line 2)			Total net nonexempt income of sp nonexcluded children (line 2 minu	ouse and/or s line 3) S
oss unearned income of SSI/SSP HSS recipient (other than	<i>/////////////////////////////////////</i>	5	<ol><li>Unmet needs of spouse and/or non (line 1 minus line 5)</li></ol>	excluded children \$
nt or IHSS payment)	S		Total countable income of person in LTC or board and care	s 400 /////////
/SSP unearmed income uctions and exemptions	\$		Health insurance for person in LTC or board and care	s ///////
nonexempt unearned income e 4 minus line 5)	\$		8. Total net nonexempt income of pe board and care (line 6 minus line 7)	rson in LTC or
ss earned income of SSI/SSP HSS recipient	s		9.	s 700
SSP earned income deductions exemptions	s		10. Maintenance need for person in	
nonexempt earned income 7 minus line 8)	s		11. Total amount needed for maintenant	s 35
I net nonexempt income lines 6 and 9)		s	(add lines 9 and 10)  12. Amount available for allocation to	spouse and/or
ne 10 is greater than line 3, the ome available to the MFBU and is on MC 176 M, column 1 or 11, lin	entered here		children (fine 8 minus line 11)  13. Allocation to spouse and/or childre (fine 5 or line 12, whichever is less)	s 2
ient income evailable" e 10 is less than line 3, the diffe ation to the SSI/SSP or IHSS re- tered here and on MC 176 M, co	rence is the	\$ \$		the ABD person or the spouse of the n MC 176 M, Column III, line 3
Worker Signature			Worker Number	Date of Computation

#### Example 4:

\$700	Unearned	income	is	received	in	the	name	of	the	LTC
	spouse*									

\$120 Unearned income is received by the couple's 17 year old disabled child.

\$1565

The entire family wants Medi-Cal.

1.	Community Property Unearned Income	\$700
	of LTC Spouse	
	**	
2.	Community Property Income	\$865

of at-home			+	-0-
,	<b>,</b> ÷	earned		unearned

4. Each Spouse's Interest \$782.50

3.

Total

<sup>\*</sup> entered LTC last month

<sup>\*\*</sup> This spouse is AFDC-MN on the basis of the incapacitated parent deprivation for the disabled child.

EXACUTE CONTROL   Country District   Country Distri	Yr.
State Number	Yr, No. and Claim No. G
Pers.   Name - First, Middle, Last   Mo. Day Vr.   (2) Heath Insurance or Raifroad Retirem   LTC SPOUSE   (2)	No. and Claim No. O
The property   1. Social Security   2. Social Security   3. Social Secur	Claim No.   O
10   10   10   10   10   10   10   10	
(1)   (2)	
(1)   (2)	
(2)   (2)	
(1)   (2)	
(2)   (1)   (2)	
Security   Social Security	• • • • • •
II. Income of MFBU members applying as aged, or disabled plus income of spouse or (except PA or other PA)  III. Share of cost computation (except PA is a section in the except PA is a section (except PA is a section in the except PA is a section or except PA is a section in the except PA is a se	
Texas of contemporaries of spouse or selected plus income of spouse or selected plus income of spouse or selected plus income of spouse or selected plus income from 1. 18    2. ABD-MN	
2. ABD-MN D. Spouse or Perent 1. Social Security. 2. Countable income from 11. 18  2. Net Income from Property 2. Net Income from Property 3. Total countable eligibility income ladd 1 and 2)  DEDUCTIONS ADDED BACK Filter 1. ABD income deduction 1. Social security 1. Social security 1. Social security 2. Other—itemize 2. Other—itemize 3. Other—itemize 3. Other—itemize 3. Other—itemize 3. Other—itemize 4. ABD income deduction 3. Some income	
2. ABD-MN D. Spouse or Parent 1. Social Security. 2. Countable income from 15.1 2. Net Income from Property 2. Net Income from Property 3. Other—Itemize 2. DEDUCTIONS ADDED BACK FI 4.ABD income oeductions 4. ABD income oeductions 4. ABD income oeductions 4. ABD income deductions 5. Other income deductions 6. Total one deductions 6. Total oeductions 6. Total oeduct	1/0
2. Net Income from Property 3. Total countable eligibility income ladd 1 and 2)  Property 3. Other-Hemize DEDUCTIONS ADDED BACK Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS Filter 1. DEDUCTIONS FILTER	(A) \(\frac{1}{2}\)
Property  3. Other—itemize  DEDUCTIONS ADDED BACK FI  4. AED income oeductions  4. 5. Other income deductions  2 thru 4)  5. Total unearned income (acd 1 through 4)  Finds  Finds  DEDUCTIONS ADDED BACK FI  4. AED income oeductions  6. Total oeductions  6. Total oeductions  Finds  F	
DEDUCTIONS ADDED BACK FI  4. AED income deductions   4.  5. Other income deductions   5. Other income deductions   6.5, any income deductions   6.7 otal unearned income (add 4 and 5)   7.7 otal unearned income (add 4 and 5)   7.7 otal countable income (add 3 and 6)   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Deductions   6. Allocation from LTC/B&C   6. Allocation from LTC/B&C   6. Allocation for the LTC/B&C   6. Allocation for excludes   6. Allocati	<u> 69(</u>
4.   16.5, any income deductions   5. Other income deductions   6. Total operations added back (add 4 and 5)  ctions   5. Total uncarned income (add 4 and 5)  finder   6. Deductions   7. Total countable income (add 3 and 6)  finder uncarned inc.   7. Countable uncarned inc. (5 minus 6)  finder uncarned inc. (5 minus 6)	OR LTC SOC
5. Other income deductions  5. Total unearned income (add 4 and 5)  7. Total countable income (add 3 and 6)  6. Deductions  6. Deductions  7. Countable unearned inc.  7. Countable unearned inc.  7. Countable unearned inc.  7. Countable unearned inc.  8. Allocation from LTC/B&C Income (176W, Part III)  8. NONEXEMPT EARNED INCOME  5. Allocation to exclude the excluder of the exclusion of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the excluder of the exclu	S20
6. Total oeductions added back (add 4 and 5)  5. Total unearned income (add 4 and 5)  7. Total countable income (add 3 and 6)  6. Deputions  6. Deputions  7. Total countable income (add 3 and 6)  6. Deputions  7. Countable unearned inc. (5 minus 6)  7. Countable unearned inc. (5 minus 6)  8. Allocation from LTC/B&C Income (176W, Part III)  8. NONEXEMPT EARNED INCOME  7. Allocation to exclude (176W, Part III)  8. Allocation to exclude (176W, Part III)	
2. Foliat thearned income (acc 1 through 4)   7. Total countable income (acc 1 through 4)   (acc 3 and 6)   (acc 3 and 6)	<del>-</del> , -
nus 6)  Dinec unearned inc.  7. Countable unearned inc.  (5 minus 6)  Roome deduction —\$20  B. NONEXEMPT EARNED INCOME  5. Allocation to exclude a line of the content of t	
72 and 7b)  (5 minus 6)  E. Allocation from LTC/B&C   Income (176W, Part III)  B. NONEXEMPT EARNED INCOME  5. Allocation to exclude:	
Discome Deduction — 520 B. NONEXEMPT EARNED INCOME 5. Allocation to exclude:	ONS
2. AndCation to excluded	13.4
to the earned median	
XEMPT EARNED INCOME  9. Subtotal countable  10. Income to determine PA Eligibility	- <del></del>
Earned a. b.   10. Child Support/	
Atimony paid. 12. Total allocations/deductions	4 - 1
inder   12. Total countable income   (200 E through 21)	134
inus 12) (7 minus 12)	يزيدا سيم
ined earned inc.  32 and 13b)  14. Total rist nonexempt income rounded	ر اسے
unused \$20 15. Maintenance need	ا بان ا
noe: in us 35)  2. MFBU members not in LTC  No.	
16 by 2)  b. MFBU members in LTC	-
PERSONAL NEEDS  PERSONAL NEEDS  PRESONAL NEEDS	
c. Total maintenance need	1
[35a - 25b] [36. Share of cost	
(14 minus 15)	1 = 1
Vor-er Signature/Concutation Date   Wor-er Number   County Use   The	

State Nur	nber	1	☐ Change ☐ Retroactive Elig.	Correc	tion Mo.	ctive Eligibility Date for	
d 7 Digit Seria		Pers. BU No.	Name – First, Middle, Last	Birthda Mo. Day	te Sex	(1) Social Security N (2) Health Insurance C	ساأ سلامة المسا
<u> </u>		10	thome shouse			or Railroad Retireme. (1)	nt No. Cove
X			child			(1)	
						(1) (2)	
				ļ		(1) (2)	
		1				(1) (2) (1)	• • • • •
						(2) (1)	
me of MFBU mer disabled plus incept PA or other P.	nbers applications of	ying as aged, blir spouse or pare	nd. II. Income of MFBU members not I	isted in I.	<u> </u>	e of cost computation	
EXEMPT UNEA		OME	A. NONEXEMPT UNEARNED INC	OME	1 Count	able Income from 1 14	<del></del>
a. A	BD-MN	b. Spouse or Parent	1. OASDI	٠,	<del></del>	able Income from I 14	500
DI /	<u> 7.0</u>		2. Net Income from Property		3. Incom	e allocated from LTC/B& to family members at	-1-0
Property —Itemize			3. Other-Itemize		4. Combi	175W, Part III)	154
			4.			2, and 3)	165°
1 thru 4)			5. Total uncarned income		<b>childre</b>	ion to excluded n (176W, Part I)	
ned unearned inc	, ,		B. NONEXEMPT EARNED INCOM		6. Income Eligibit	to determine PA	
ncome deduction		20	6. Total Net Earned Income (MC 176W, Fart IV, Line 11.)		7. Health	Insurance	
able unearned Inc ous 7)	ome	00	C. TOTAL COUNTABLE INCOME	· · · · · · · · · · · · · · · · · · ·	8.	İ	
XEMPT EARNE	INCOME		7. Subtotal (add 5 and 6)	1.	9.		
Earned a.	e	b.0000	8. Child Support/Alimony Paid		10. Total al	locations/deductions hrough 9)	
a and 9b) irned Inc. deduction		h L	9. Total Countable Income (7 minus 8)  NOTE:		11. Total ne	t nonexempt Income	624
unused S20 nder (10 minus 11		<u> </u>	If there is income from which Educati Expenses are deducted (Section	onal		t nonexempt Income	634
ble earned Incom 12 by 2)	e	1100 1100	calculations here. Enter het amount or	line 3 or 4,	13. Mainten	ance need	
ountable Income and 13)		500	Total income for educational purpose Less total educational expenses		LTC No		654
he following dedu Part VI before co	ctions app mpleting (	ly, complete	Net countable income		<ul><li>Person</li><li>Upkee</li></ul>	al needs p of home of disabled dependents	
ional Expenses Parent Support t Deduction	Se Se	ection 50547 ection 50541	•		c. Total ma (13a + 1 14. Share of	sintenance need 3b)	1654
s 1/3 xpenses for the Bi	Se ind Se	ection 50551 ection 50551.1 ection 50551.4			(12 minu		1-6-
for Self-Support		etion 50551.5		<b>!</b>	····	Share of Cost	
t Income						\$ 10)	1

Worker Signature

Worker Number

Computation Date

County Use

		icel	County Use	Data This
lame				Date This Form Effective
Exam			Case Number	Number in MFBU
HILDREN WITH SEPARATE OM THE MFBU NO.	INCOME OR PROPE	RTY EXCLUDED		
taintenance need for MFBU plu	s excluded child(ren)	\$		\$
laintenance need for MFBU		s		
xcluded child(ren)'s share of ma ine 1 minus line 2)	sintenance need	s	——————————————————————————————————————	
et nonexempt income of exclud		s		
llocation to excluded child(ren) ine 3 minus line 4)		s		
nter above amount on MC 176 N	A, column III, line 5			
• .				
			;	
•				
			III. ALLOCATION FROM LTC OR B SPOUSE AND/OR CHILDREN A	OARD AND CARE PERSON TO THOME
I/SSP OR IHSS RECIPIENT(S)	IN FAMILY-INCOM	ME AVAILABLE/	Maintenance need for spouse and/o     (other than excluded children)	
/SSP appropriate payment level us IHSS authorization for IHSS ly)			Total countable income of spouse and/or nonexcluded children	500 VIIII
tual SSI/SSP payment IMSS payment)	s		Total allocations/deductions of spouse and/or nonexcluded children	s //////
t nonexempt income used to exemine grant (or IHSS)		*////////	Total net nonexempt income of spi nonexcluded children (line 2 minus	ouse and/or
est minus line 2)  pss unearned income of SSI/SSP  HSS recipient (other than	///////////////////////////////////////	s /////////	<ol> <li>Unmet needs of spouse and/or none (line 1 minus line 5)</li> </ol>	excluded children \$ 134
nt or IHSS payment)	\$		Total countable income of person in LTC or board and care	· 700
/SSP unearned income juctions and exemptions	s		7. Health insurance for person in	\//////
nonexempt uncarned income e 4 minus line 5)	\$		8. Total net nonexempt income of per	
rss earned income of SSI/SSP HSS recipient	s		board and care (line 6 minus line 7)  9.	s 700 s ////////
/SSP earned income deductions exemptions	s		10. Maintenance need for person in	
nonexempt earned income 7 minus line 8)	s		11. Total amount needed for maintenan	s 3.5 ///////
al net nonexempt income l lines 6 and 9)		s	(add lines 9 and 10)  12. Amount available for allocation to s	\$ 35
ne 10 is greater than line 3, the d me available to the MFBU and is on MC 176 M, column I or II, lir	entered here		children (line 8 minus line 11)  13. Allocation to spouse and/or children	\$ 665
the 10 is less than line 3, the difference is the ation to the SSI/SSP or IHSS recipient and			A For share of cost determination of the ABD person, enter above amount on B For share of cost determination of st	1 MC 176 M, Column III, line 3
tered here and on MC 176 M, co Worker Signature	iumn III, line 6.	\$	enter above amount on MC 176 M, c	Column II, line 4  Date of Computation
		1		in in a company of the second

# Example 5:

\$600	Unearned	income	is	received	in	the	name	of	the	LTC
	spouse*									

Unearned income is received in the name of the spouse at home the spouse states that \$200 of this amount is separate income received from an inheritance; only LTC spouse wants Medi-Cal.

- 1. Community Property Unearned Income \$600 of LTC Spouse
- 2. Community Property Income \$400

  of at Home Spouse \$ -0- + \$ 400

  Earned Unearned
- 3. Total \$1000
- 4. Each Spouse's Interest \$500

<sup>\*</sup> entered LTC last month

	<u> -X</u> (_,;	<u> </u>	10.5	· – }					Cour	nty District	County	Use
		1			<u> </u>	<del></del>			Enter	Tive Flanchilles St.		
State	Number	- 172.01	terminatio.	n L	Change 🗆 Retro	Pactive Elig.	□ Correct	ion	Mo.	tive Eligibility Dat		
1		1	Fers.			· · · · · · · · · · · · · · · · · · ·	Bimhda	iŧ	Sex	(1) Social Secur	Yr.	
<u> </u>	Serial No	. MFB	U No.	, N	ame – First Middle, I	Last	Mc. Day	Yr.		14/ Lesizu (U2029	Dee Ciaim	No. Or
				TC	SMALL	6		<u>_</u>		or Railroad Res	ifement N	o. Cove
-				<u> </u>				<u> </u>	i	(2)	• • • • •	• • •
	<del></del>	<del></del>	<del>                                     </del>							(2)	• • • • • •	• • • •
		<u></u>	1							(1) (2)		• • • •
<u> </u>	···				·····					(1)		<u> </u>
								<u>-</u>		(2)		
						<del></del>				(2)		• - •
		<u> </u>	1 1	·						(2)		• • •
The of MERI	1	1	<u> </u>	<del></del>	<del></del>					(1) (2)		
me of MFBL d, or disabled m (except P)	plus inc	ome of	spouse or		I. Income of MFBU (except PA or other	I members no her PA)	t listed in L	111.	Shar	e of cost computat	іол	
EXEMPT U	NEARNE	DINC	OME	1	A. NONEXEMPT U	NEARNED I	NCOME I	1 7.	Count	able income from I	**	710 =
	z. AED-	MN	D. Shouse (	or	1. Social Security			!			1	750
ial Security			Parent		2. Net income from					able income from 1		<u></u>
Income					Property			3.	Total ( incom:	Countable eligibility		491
n Property				_   '	. Other-itemize		<del></del>			ONS ADDED BAC	Y 500 1	* * * * * * * * * * * * * * * * * * *
er— slae								4.	AEDin	ncome peductions	1÷520	TC SOC
Y. 1000	۱۳۰۰ سیم	$\overline{}$		-   4		<u> </u>			اج <u>ي</u> ۽ ا	ny income deductions	<u>n):</u>	<del></del>
<u>ا است</u> ار الروح إ			<u> </u>					<u> </u>				
1 thru 4) !			!					C.	) ಭೀಷಾ ರ (ಕರರ 4	ieductions added ba and 51	esk	61.
				_   •	. Total unearned inco (add 1 through 4)	ome		7.	Totalic	ernoomi sidstauo		<u></u>
inus E)	2.		Þ.	6	. Deputions		<del> </del>		ecc 3	<del></del>		
bines unear	ned inc.		2.0	7	. Countable unearned	inc.				TONS AND DEDU		
income acci	ustion	اميل 520 –			(5 minus 6)		<del> </del>	. A. B. A.	Moseti Norne	on from LTC/B&C (176W, Fed. III)	1	
Table unear			/\~	<del></del>	NONEXEMPT EAR	NED INCOM	Ε	9. 6	lotati	on to excluded (176W, Part I)	1	
⊕∉ (E minus	\$ <b>)</b>	د نهد			Net earned Income IMC 176W, ParalV, I	Line 11)		10. Ir	ισοπιέ	to determine PA		
EXEMPT EA	RNED IN	NCOME		ş,	Subtotal countable income (add 7 and 8	,	<del></del>	·	licibill taltn l	nsurar.ce	<u> </u>	
≤ Earned me	à		5.	10.	Child Support/	<u> </u>		-}			<u> </u>	
actions		<del></del>		11.	Alimony paid. Total countable inco	ome i				locations/deduction hrough 11)	15	
≥inoer	ż	<del></del>			(9 minus 10)	- [ -	· ·			t nanexempt incom	<u> </u>	
מיחים (12			b.					•	ការកម			
Dinec earned 13a and 13b								24. To	otal ne	t nonexempt incom	ne   .	
ezrned inc. d Sunu	ecuction								nnoed	ance need	<u> </u>	<u>) , ) (, , </u>
e in Oer								<u></u>				
nlnus 15) t≥b-e earned	inc.							2. hti	FBU n p.	embers not in LTC		
36 by 2)			17							nembers in LTC		
countable in 20 and 17)	·c.		16.0				~	٠ ١	Jokees	slineeds of home		
APT INCOM	E		- <u>-</u> -	- —					VEECS I	of disabled depende	nts	
								I	stalima Sa + 1.	intenance need 5b)		= =
								16 5			<del></del>	<del></del>
								(3)	e minu	rs 15)		55
Worker Sign	ature/Co	mputz:	ion Dzte	· · · · · · · ·	Worker Number	County U	se	J.7. Ur	oerp2	yment adjustment		
							,			Share of Cost		
					<u> </u>			1 (3)	ninu	s 12)		_

		····	🗆 Change 🗀 Retroactive Eli	g. 🗌 Correct		
Sta	ite Number			Birthda	——————————————————————————————————————	Yr.
~ 7 Digi	t Serial No. IN	Pers.	Name – First, Middle, Last	Mo. Day	(2) Health Insurance Ci	sies Na la .
1				<del></del>	or Hailroad Retiremen	t No. Cover
<del> </del>	<del></del>	-++0	Thome. Spruce	<u>C </u>	(2)	
<del> </del>			nelicité		(1)	<del></del>
	ļ		Ĺ		(2)	
					(2)	
				ļ	(2)	
					(0)	
					(2)	
<u></u>	<del></del>				(1)	
<u> </u>					(1)	
e of MFB sabled pl t PA or o	lus income o	plying as aged, bli f spouse or par	nd. II. Income of MFBU members no ent (except PA or other PA)	t listed in I.	III. Share of cost computation	
KEMPT L	JNEARNED II	NCOME	A. NONEXEMPT UNEARNED I	VCOME	1. Countable Income from I 14	
	a. ABD-MN		1. OASDI	;		
<del></del> _		Parent	Net Income from Property		Countable Income from II 9     Income allocated from LTC/B&i	700
ome			<del></del>	V	person to lamily members at	C .
operty			3. Other-Itemize		home (176W, Part III) 4. Combined Countable Income	
Itemize			com proposau	500	(add 1, 2, and 3)	
			*interitance		ALLOCATIONS AND DEDUCTION	NS.
			5. Total unearned income	900	5: Allocation to excluded children (176W, Part I)	
thru 4)	ned income		(add 1 thru 4)	_7 <i>0</i> 0	6. Income to determine PA	
and 5b)		 	B. NONEXEMPT EARNED INCO	ME	T Eligibility	
ome dedi	uction	→\$20	6. Total Net Earned Income		7. Health Insurance	
ole unearr	ned Income	<del></del>	C. TOTAL COUNTABLE INCOME		8.	
EMPT EA	ARNED INCO	ME	7. Subtotal (add 5 and 6)			
arned	а.	b,	8. Child Support/Alimony Paid		9.	
ed earned	Income ]	<del></del>	9. Total Countable Income		10. Total allocations/deductions (add 5 through 9)	
and 9b)			(7 minus 8)	700	11. Total net nonexempt Income	<del></del>
	sed S20	***	NOTE:		(4 minus 10) 12. Total net nonexempt Income	
ier (10 m	inus 11)	-	Expenses are deducted (Section	If there is income from which Educational Expenses are deducted (Section 50547), show		
le earned	Income		- calculations here. Enter net amount	on line 3 or 4.	13. Maintenance need	
2 by 2)			Total income for educational purp	ose	a. MFBU members not in	
untable li nd 13)	ncome		Less total educational expenses		b. MFBU members in LTC	<b></b>
			Net countable income		Personal needs	
followin	ng deductions a	apply, complete			Upkeep of home	
	fore completing				<ul> <li>Needs of disabled dependents</li> <li>Total maintenance need</li> </ul>	
nal Exper arent Sup	port	Section 50547 Section 50541			(13a + 13b)	
Deduction	n	Section 50551			14. Share of cost (12 minus 13c)	
	r the Blind	Section 50551.1 Section 50551.4 Section 50551.5			15. Underpayment adjustment	
				,	16. Adjusted Share of Cost (14 minus 15)	
			<u> </u>		474 GUBOS 151	4

Worker Signature

Worker Number

Computation Date

County Use

	COLITON WORKS	DEET	County Use		
Hame		·		Date This F	orm Effective
	5		Case Number	Number in	
LOREN WITH SEPARATE	INCOME OR PROP	ERTY EXCLUDED			MFBU
aintenance need for MFBU p					
sintenance need for MFBU	as excisued childfren	)   \$		•	
cluded child(ren)'s share of a	This topone and the	\$			
it it minus tine 21		s			
nonexempt income of exclu-		s			
e 3 minus line 4)	·	s			
er above amount on MC 176	M, column III, line 5				
•		•			
			III. ALLOCATION EDOLUTE		
SP AS LUC			III. ALLOCATION FROM LTC OR SPOUSE AND/OR CHILDREN	A I II UNIE	
SP OR IHSS RECIPIENT(S) DCATED		IE AVAILABLE/	Mzintenance need for spouse an (other than excluded children)	d/or children zt ho	me s 509
SP appropriate payment leve IHSS authorization for IHSS	\$		Total countable income of shouse and/or nonexcluded children	s 1700	
el SSI/SSP payment ISS payment)	s		Total allocations/deductions of spouse and/or nonexcluded children		
onexempt income used to nine grant (or IHSS) minus line 2)		<u> </u>	Total net nonexempt income of nonexcluded children (line 2 min	\$ \$ spouse and/or	
unearned income of SSI/SSP		\$ 7////////	5. Unmet needs of spouse and/or no (line 1 minus line 5)		\$ ///
S recipient (other than or IHSS payment)	5		6. Total countable income of		VIIIII
P unearned income ions and exemptions	s		person in LTC or board and care 7. Health insurance for person in	\$	-///////
nexempt unearned income minus line 5)	s		LTC or board and care  8. Total net-nonexempt income of p	\$	
earned income of SSI/SSP S recipient	s		board and care (line 6 minus line 9.	7)	s
earned income deductions imptions	s			S	<i>Y///////</i>
exempt earned income ninus line 8)			Maintenance need for person in LTC or board and care	S	
t nonexempt income	\$ ////////		<ol> <li>Total amount needed for maintena (add lines 9 and 10)</li> </ol>		s
o is greater than line 3, the d	ifference is		<ol> <li>Amount available for allocation to children (line 8 minus line 11)</li> </ol>	spouse and/or	s
available to the MFBU and is AC 176 M, column I or II, lin tincome available"	entered here e 3, as "PA	; ; ; i	13. Allocation to spouse and/or childre (line 5 or line 12, whichever is less)	en	
0 is less than line 3, the differ in to the SSI/SSP or IHSS ren	iniant and		A For share of cost determination of ABD person, pater above	the ABD person or	the spouse of the
d here and on MC 176 M, col	umn III, line 6. \$		B For share of cost determination of enter above amount on MC 176 M,	MINIC 176 M, Colu	mn III, line 3 dren at home,
2			Worker Number	Date of Computat	on
(62)			V.		